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REPORT FROM MEXICO

BIGGER MARKET
FOR FRENCH POULTRY

RECORD COTTON CROPS
IN SOUTH AFRICA

FOREIGN AGRICULTURE

Including FOREIGN CROPS AND MARKETS

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Including FOREIGN CROPS AND MARKETS

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Farm family at Papantla market, Vera Cruz, Mexico. For article on Mexico's farm production and trade, see page 5. Its illustrations and the cover are Pan American Union's.

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DEPOSITED BY THE
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France Sees Bigger Market for Its Poultry

—especially in Europe, as EEC rules cut outside competition

By HOWARD A. AKERS
Assistant U.S. Agricultural Attaché, Paris

The French poultry industry is undergoing a "cautious" expansion, based largely on hopes of increased export sales to the countries of the European Economic Community (EEC), particularly West Germany. The German market had been steadily developed by U.S. poultry exporters with a frozen product until July 1962, when the new EEC poultry regulation began to shut out the American product in favor of imports from EEC member countries.

With duties on U.S. poultry now totaling 12.48 cents per pound, the American share of the total West German market fell from 35.5 percent for the first 4 months of last year to 15.8 percent for the same period this year. France's share rose from 4.3 to 8.1 percent. Imports from the United States were 52 million pounds during January-April 1962 and 16.2 million during January-April 1963, whereas imports from France rose from 6.4 million pounds to 8.4 million between the same periods.

France has moved ahead fast as a poultry-exporting nation. It now produces about 46 percent of the total poultry meat in the Common Market countries. In 1959, France was still a net importer of poultry meat. Since 1960 it has had a net export balance each year. In 1960 this was over 5.2 million pounds, in 1961 over 16.5 million, and in 1962 over 33 million—a sixfold increase since 1960. Planned exports for 1965 amount to about 88 million pounds.

Of this rise in shipments abroad, a large part has gone to West Germany. French poultry exports to West Germany increased from 509,000 pounds in 1960, when total exports were 10 million pounds, to 18.6 million pounds in 1962, when total French exports were 34 million pounds. In short, over half of shipments in 1962 went to West Germany. Exports to West Germany for the month of March 1963 were six times the amount exported for the full year in 1960.

Conditions alike, operations different

The United States and France have some things in common with respect to poultry. Just as the United States is the largest producer of poultry in the world, France is the leading producer in Europe. In both countries, the domestic market is the primary outlet for poultry production; and the rate of growth of their poultry industries roughly parallels the increase in their domestic consumption. Also, both countries have high per capita consumption of poultry, though in the United States it is more than twice that of France.

French and U.S. poultry exports represent less than 4 percent of their production, but this small percent of exports is vitally important to the poultry industry of each nation. With the expansion of international poultry trade, both countries want a substantial share in the increased markets.

A sharp difference between the two countries lies in the scale of their poultry operations. In France, poultry is largely a small family farm enterprise and not a mass production operation, as in the United States, and the policy of French farm organizations and the French Government is to maintain this status. The Complementary Law for Agriculture, passed on August 8, 1962, prohibits the creation or expansion, without authorization of the Ministry of Agriculture, of any poultry and egg farm beyond the limits established for the area in which the farmer is operating. This limitation is to be placed on the number of poultry, not the size of the farm in land or buildings.

Nevertheless, a wide range does exist in the size of French poultry farms. At one end of the scale are the many small farms where poultry production may be under the control of the farm housewife. At the other are the completely integrated large farms in which a single farmer produces and feeds baby chicks, produces broilers and eggs, and slaughters, freezes, and delivers poultry to French customers by his own trucks. He may even export frozen poultry to several foreign customers.

Broilers in Brittany

Although poultry production exists throughout France, broiler raising is heavily concentrated in two areas of Brittany. These areas are characterized by small farms of about 25 acres each, and by large families. A high percentage—about 45 percent—of the population is engaged in farming, since opportunities for other employment are few. Farmers generally produce four broods of chickens per year, with total annual production ranging from 10,000 to 40,000. Roughly 30 percent of the farm income in these areas comes from poultry and egg products.

The poultry areas of Brittany are described as poor farm areas, and are considered to be a social problem. Until about 1956 little attempt was made to organize poultry

production; since then, production and marketing have gone through various stages of planning. As little chance exists of shifting to other work in the area, the problem is to make sure that the owner who stays on his farm and raises poultry can make a living.

The farmer who uses all the materials and information available to him can expect an income from poultry production. If he wishes, processors, feed dealers, or, in some cases, cooperatives will furnish him baby chicks, veterinary services, and a yearly purchase contract containing a minimum price for the year for the broilers he delivers.

Already the Brittany farmer has made technical advances. For example, in 1956 it required 80 to 90 days to produce a broiler weighing 3.5 pounds. In 1963, by contrast, the average time required to produce a broiler of the same weight was 60 to 65 days. In 1956, about 3.6 pounds of feed were required to produce 1 pound of liveweight poultry; by 1963 this had been reduced to 2.2 to 2.4 pounds. In 1963, the average size of the farm flock was three to four times as large as in 1956.

Expansion going on

Feed mills, killing plants, and marketing organizations have increased proportionately more in size and efficiency than have poultry farm operations. The largest cooperative poultry operation in the Brittany area purchases feed, baby chicks, and veterinary services for its members, and then slaughters and markets the poultry. In 1956 this cooperative handled 1.5 million pounds of poultry; in 1963 it expects to handle 22 million pounds.

Commercial firms are also expanding. One of these claims that its scale of operation in 1963 is about six times the volume of 1956. Another has projected in 1963 operations showing a 40-percent increase over 1962. Since the latter firm works in close cooperation with the farmers at all stages, its projections are probably correct.

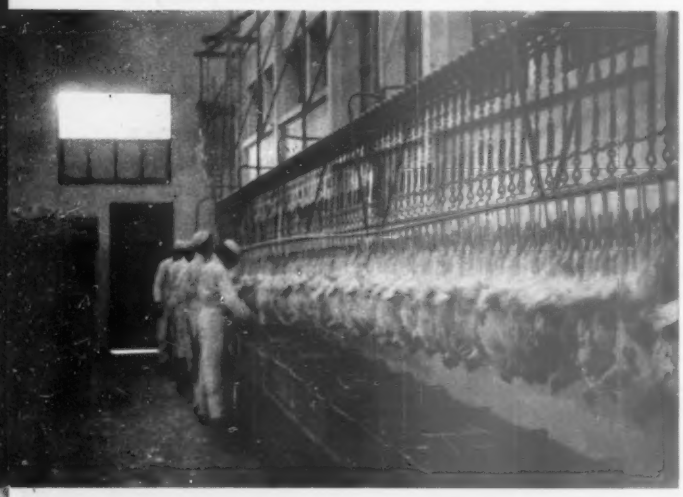
Although some of the killing plants are already equipped to eviscerate and freeze poultry, much of this capacity is unused. It is expected that the market in Germany, for example, will be largely for fresh poultry rather than for the frozen product as supplied by the United States. The French have had experience in delivering fresh poultry from Brittany to the eastern part of France, and a few more miles into Germany poses no problem. The industry does, however, expect a gradual increase in the sales of frozen poultry. It also visualizes a time when the head, giblets, and feet will not be sold to the consumer. This will require an educational program for the French consumer, who at present considers the higher price asked for American-style ready-to-cook poultry unjustified.

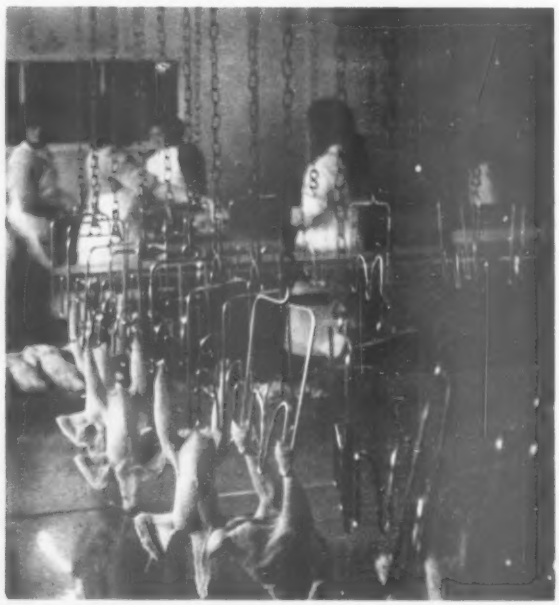
170 million customers

France feels that it has a potential of 170 million European customers in 1963, compared with only 42 million French customers in 1956. The industry recognizes, however, that possibilities exist of newly developing competition, and that expansion may involve danger of overproduction and price problems. For instance, no way exists of determining shifts in production methods that may be adopted by the other producers in the Common Market. Both the industry and the government recognize the competition problem by placing emphasis on more efficient operations, all the way from farm to the consumer.

One of the industry's problems is lack of adequate information on which to plan. To develop adequate data, France has recently made statistical reports on poultry mandatory in order to determine actual poultry production Such data as are available indicate that poultry production in France has increased about 20 percent from 1957 to 1962, while it appears that for all six of the Common Market countries there was an increase of 47 percent during the same period.

This large, completely integrated poultry plant provides chicks, feed, and veterinary services to farmers. Below, birds on way to slaughter; at right, ready for marketing.





Peaked-roof corn crib near Morelos. Corn is the country's largest crop, grown for the most part without irrigation.

Roadside scene near Oaxaca. Though much of Mexico is dry and mountainous, its farm output has risen rapidly.

Report From Latin America: Mexico

By HENRY HOPP
U.S. Agricultural Attaché, Mexico

In the decade between 1950 and 1960, Mexico made remarkable agricultural progress. Production increased 62 percent. The land planted to crops expanded 32 percent. The country's per capita food consumption went up, and at the same time, more agricultural commodities were available for export. In 1960, these exports represented 54 percent of all exports, with a value four times as large as the value of the country's agricultural imports.

Agricultural output in Mexico continues to rise, though at a considerably slower rate. Furthermore, in the last year or so, increases in crop production have been more selective, and this is the trend that is expected to prevail for the next few years. Considered crop by crop, the situation appears to be thus:

Cotton: The sharp rises in production have now stopped, and what happens in the future will depend primarily on the competitive position of cotton grown by other countries, especially U.S. cotton. Declining world cotton prices are resulting in shifts to other crops in the northern part of Mexico, but this is partly offset by increased production in the South. Export availabilities will increase but probably not very much. Cotton is Mexico's leading export commodity.

Corn: Still the most important crop in Mexico, both in value, corn for the most part is grown without irrigation; and dry weather in some areas this year cut back the gains made as a result of the government-sponsored production program. This program is to be continued and, combined with good weather, could result in much larger corn output.

There is a continuing strong demand for corn, mainly because of the country's growing livestock industry, so that this year Mexico is importing several hundred thousand tons of feed grains, including sorghums. This situation could change suddenly within a year's time if weather is favorable—even to the point that corn surpluses may become available for export. Exports, though, if any, would be relatively small since the domestic price is higher than the world price. On the other hand, if imports should continue to be needed for several years—which is a possibility—they are likely to be purchased from the United States.

Wheat: In the 1950's Mexico's wheat production more than doubled, so that the country is now self-sufficient in wheat. Also, a further rise in output is probable in the immediate future. It is quite possible that Mexico might have small amounts of wheat to export, but it would have trouble selling its wheat on the world market without special arrangements to offset the high domestic price.

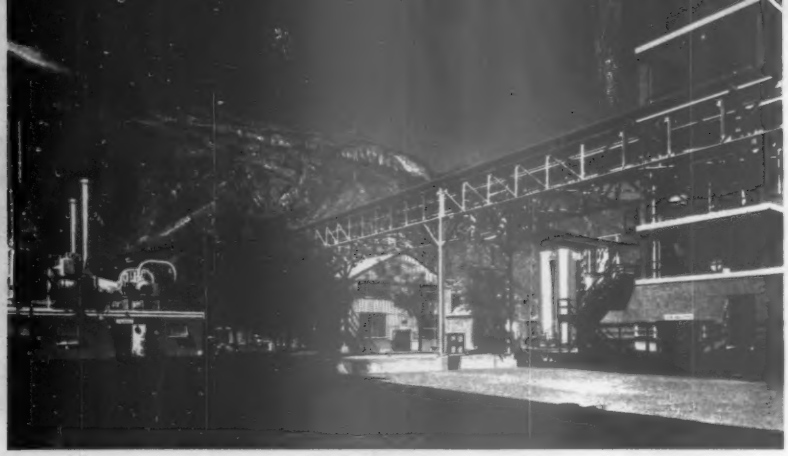
Vegetables: Exports of vegetables from Mexico's West Coast area to the United States set a record this year as a result of freezes in the U.S. winter vegetable area. The consequent high prices for the Mexican production can be expected to stimulate further planting next season.

Cattle: Mexican exports of live cattle and meat are also at record levels, most of them going to the United States. The Mexican livestock industry and the government are aiming for further increases, so that larger offers of Mexican cattle and meat can be anticipated. A new development is the production of fattened cattle and the export of carcass beef.

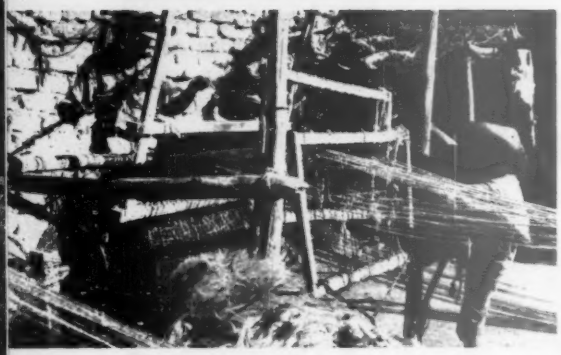
Mexico is the largest customer for U.S. dairy and beef breeding stock. The demand should continue and might even be materially strengthened by sales promotion.

Tobacco: This is another crop that has more than doubled in output. Production is still trending upward and is likely to continue in this direction, raising export availabilities moderately. Imports of Virginia-type leaf may go on for a time but further restrictions are a distinct possibility.

Oils and Oilseeds: Mexico may export more oils and



Left, cottonseed oil plant where oil is deodorized for use in food manufacture. Below left, rope being manufactured by hand from henequen, of which Mexico is the world's largest grower. Below right, a Yucatan sisal field. Sisal is also important in Mexico.



oilseeds but the increase will not be large. Imports have been restricted by the government and are greatly reduced, a situation not expected to change.

Sugar: Significant steps are being taken to boost Mexican sugar production, so that for several years at least, more will undoubtedly go into the export market.

Strawberries: Mexico's strawberry industry is still booming and barring artificial limitations, shipments to the United States should continue to mount. The Mexican packing industry has recently shown some concern over the possibilities of restrictive U.S. action and is talking of imposing a limitation on further increases in exports.

Coffee: After several years of mounting production and larger exports, the coffee situation has stabilized. Stocks are low but at present prices no expansion in production is expected. Some reduction has been made in the harvested area but this is balanced by greater yields.

General trade picture

In 1962 the gross national product from agricultural sources rose 5 percent—well above the 3-percent growth in population and the total product of 4.2 percent.

Export increases were registered on cotton, henequen, milled rice, and tomatoes. Sugar exports declined. Agricultural imports are estimated to have increased 18 percent, with the biggest gains in corn, sorghums, tobacco, and powdered milk.

The United States is Mexico's principal trading partner for both agricultural and nonagricultural commodities. In 1962 Mexico shipped to the United States agricultural goods valued at more than $271 million. That same year it took from the United States agricultural items valued just under $64 million.

Mexico ranks third in Latin America as a market for U.S. agricultural commodities. However, the U.S. share in Mexico's imports and exports has declined the past few years. Bilateral trade agreements and the compensatory exchange program have contributed to some shift in trade to other markets and suppliers. Also, Mexico's trade with other members of the Latin American Free Trade Area, while small in total, increased significantly last year.

Economic development

Mexico has submitted a 3-year economic development plan to the Council of Nine of the Organization of American States as well as to the International Bank for Reconstruction and Development. The plan calls for an average growth rate of 5.4 percent during the period of the plan and a total gross investment of $6.4 billion. About $3.2 billion will be public investment, 18 percent of this to be used for farm improvement, largely irrigation.

Currently, 11 dams are underway to irrigate over 615,000 acres of land, and four large irrigation districts in the northwest are being rehabilitated. A large dam is being built to protect from floods an area of 865,000 acres in Mexico's southeast and to provide electricity.

The country's land reform program is also moving ahead. During 1961-62, 8.4 million acres of land were distributed, bringing the total distributed by the present administration to nearly 25 million acres.

About half of South Africa's cotton comes from the irrigated fields of Upington.

By WILLIAM J. EDENS
U.S. Agricultural Attaché
Pretoria, Republic of South Africa

South Africa Increases Cotton Production

U.S. cotton's major African market, South Africa, is updating its production methods to meet more of its own cotton needs.

The outlook for the United States to continue supplying the Republic of South Africa about two-thirds of its annual demand for raw cotton does not appear to be as bright as it was 2 or 3 years ago. True, South African cotton imports have continued to rise, and so has demand. But production is increasing strongly. It has gone from 22,000 bales (of 500 pounds) in 1960 to 32,000 in 1962; 45,000 are forecast for this year. The future of U.S. cotton exports to South Africa will, of course, depend on the balance achieved in these trends.

Combining to stimulate cotton production in South Africa are new methods of combating insect pests, prospects of more water for irrigation, better adapted varieties, guaranteed prices by cotton mills for all cotton produced, and the overproduction of certain other crops in the cotton areas. It is claimed that insect control methods alone can step up cotton production fourfold in the near future.

In the immediate past, South Africa depended on other countries for about 80 percent of its raw cotton requirements as well as for much of its cotton textile needs. In 1951 the Republic consumed about 38,000 bales of raw cotton; and its domestic crop was only about 12,000. But by 1960, production and consumption had reached 22,000 and 90,000 bales respectively, only to jump in 1962 to 32,000 bales produced and over 100,000 bales consumed.

The 1963 crop was originally estimated at 54,000 bales but later reduced to 45,000 because of heavy rains in the irrigated areas and isolated droughts in the drylands. The increase is caused primarily by new control methods for bollworms and other pests.

Cotton pickers in the irrigated region of Upington pause to exhibit their harvest. Improved cotton varieties and new methods of insect control have helped to increase South Africa's cotton output.

Cotton grown in South Africa is of the American upland type and is picked by hand. It has been grown in South Africa since the American Civil War days, when it was introduced to fill the import vacuum of English mills cut off from cotton supplied by the Southern States. Since that time, the amount of cotton produced in South Africa has varied widely, with a period of general expansion coming immediately after the Second World War, when cotton prices advanced sharply. This year, for the first time, government certified seed is being produced in the Republic.

The area planted to cotton in South Africa during recent years has totaled about 41,000 acres annually. Dryland area accounts for approximately 28,000 acres, most of which is located in the Natal and Transvaal regions. The 13,000 acres of irrigated land are mainly along the lower Orange River—centered at Upington. Much land is available in dryland regions for acreage expansion, and irrigation is on the increase too.

The 1963 estimated production (before the unfavorable weather conditions) was 28,000 bales for irrigated areas and 20,000 for the dryland plus 7,000 for Swaziland.

The yield of lint per acre in dryland areas averages about 125 pounds. With favorable weather conditions and control of insect pests, yields of 1 bale per acre are obtained. In irrigated areas the average yield per acre is approximately 600 pounds, but yields of 1,000 pounds or 2 bales are not uncommon. Long staple yields are greater than short staple.

About 3 years ago, cotton farmers bargained with the mills to pay a base price for the total crop produced. That arrangement has continued, with a price being set for each annual crop. The base price for the 1963 crop, as set voluntarily by producers and mills, is 20.11 cents (28.15 U.S. cents). In addition, a 2-cent premium is paid on a maximum production of 40,000 bales into a pool, not exceeding R400,000 ($560,000). Any production above 40,000 bales will bring only the base price. Mill participation in this pool is proportionate to the extent of their cotton purchases.

Honduras' Plan for Upgrading Livestock Spurs Sales of U.S. Breeding Animals

Honduran students gather around purebred U.S. Duroc pig. Such practical field observations supplement book-and-classroom learning.

Honduras, the leading Latin American export market for U.S. livestock, has imported 30 plane loads—nearly 800 head—of purebred breeding cattle in recent months. Most are beef-type Brahmans; some, Brown Swiss dairy animals. This stock will be used to upgrade local herds—a part of the country's effort to diversify agriculture.

Last year, the Inter-American Development Bank (IDB) earmarked $1 million in credit for importation of the U.S. animals. A joint Honduran-U.S. agency selects the cattle, arranges for transportation, handles quarantine and preimmunization. IDB then sells the cattle to interested farmers at cost.

In addition to cattle, about 120 head of U.S. registered Duroc swine were recently imported for use as a foundation herd. Offspring, to be distributed to local breeders, are expected to reach 2,000 head of weanling pigs annually by 1964 and thereafter.

A joint-governments agency will provide direct technical assistance. A first step is the offering of three general livestock courses at a training center at Comayagua.

—By Dalton L. Wilson
U.S. Agricultural Attaché, Guatemala

U.S. Brahman cattle are unloaded at Toncontin Airport, Honduras. 800 head of this breed and Brown Swiss were shipped by air last year.

National Dry Bean Council Launches Market Development in West Europe

The August-September visit of a U.K. pulse industry team to the United States will initiate the market development program of the newly formed National Dry Bean Council.

The Council (NDBC), which signed its first market development agreement with the Foreign Agricultural Service in May, will carry out research and quality control programs and coordinate promotional activities for the dry bean industry. It will encourage increased participation by U.S. dry bean producer, processor, and trade groups in market development work abroad. Headquarters are at Washington, D.C.

To begin with, NDBC will concentrate on the Common Market countries, Switzerland, and the United Kingdom. Program emphasis will be on trade fairs, sponsorship of trade teams, and advertising.

In November the Council will participate in the U.S. Food and Agricultural Exhibition in Amsterdam. At the same time, a U.S. pulse team will go to Europe to map out a detailed program with foreign importers.

The foundation for market development in Western Europe already exists: all the target countries have pulse associations — and an international meeting on pulses has been held on the Continent each year since 1960. Last summer a pulse trade team from Common Market countries, plus Switzerland, visited the United States to see production areas and processing plants, and confer with the trade. The group also explored possibilities of setting up a market development project with U.S. assistance.

The Common Market countries—while not among the leading importers of U.S. beans—are expected to take more as consumer demand grows and the canning industry expands production to meet it. The United Kingdom in 1961-62 was by far the largest commercial importer of U.S. beans, taking 816,000 bags. These were mostly pea beans, one of 12 commercial varieties the United States exports.

Once the Western European program is well underway, the NDBC and FAS plan to branch out into other areas, possibly Japan and Latin American countries. Venezuela is the second largest market for U.S. beans.

French and Italian Rice Growers Set Up Union

In a step towards protecting and furthering the interests of the rice community of the EEC, the two Common Market rice growing countries—Italy and France—recently signed a charter setting up the EEC Union of Rice Growers (URCEE).

The main objective of the Union will be to act in defense of French and Italian rice within the framework of the EEC. It also aims to improve European rice production, stimulate the consumption of rice, and coordinate the activities of individual rice growing organizations of the two countries. One of the first problems the URCEE will deal with will be the opposition by Europe's nonrice producers to the proposed EEC rice regulations.

Italy and France are the only rice growing members of the EEC. In 1962, Italy's production reached 652,000 metric tons, making it Europe's No. 1 producer. France harvested 137,000 metric tons. Rice production of both countries is mostly of the short grain variety. The United States for the past several years has been the major supplier of rice to the European community. Together, Italy and France supplied only 9 percent of total 1961 EEC imports of rice.

CCI Uses TV in Italy —First Time in Europe

The Italian Cotton Committee and the Cotton Council International (CCI) recently used paid television to promote cotton in Italy—the first time U.S. cotton has used commercial TV in Europe.

Ten filmed telecasts appeared approximately once every 9 days during April, May, and June on the national network's popular "Carosello" program. Using as theme, "Cotton, Nature's Wonder Fiber," each film featured traditional American music, along with animated cartoons. Thirty-second commercials plugged cotton for clothing and household items.

The commercials were scheduled to coincide with "Cotton Weeks" in various Italian cities. On the days of the telecasts, ads calling attention to the program were carried in newspapers in 8 large cities; 12,000 posters were used in stores.

Italian retailers urged the use of paid television this year—despite its expense—because of TV's importance in Italy. Viewers, numbering between 10 and 15 million, believe that TV advertisers make quality products.

Four-Country Grain Team Tours U.S. Wheat States

A 10-man wheat team—from Portugal, Angola, Mozambique, and Brazil—visited the United States June 7-July 3 at the invitation of FAS and Great Plains Wheat, Inc.

The itinerary through the big-wheat-producing states of Kansas, Nebraska, Colorado, and the Dakotas included a meeting with the Kansas Board of Trade and tours of wheat analysis laboratories, flour mills, and bakeries. The team inspected wheat growing, and marketing operations.

In 1961-62 Portugal got nearly all of its wheat from the United States, or 284,000 metric tons.

Spain Supports Feed-Grain Prices

Spain's Ministry of Agriculture issued a decree on June 5 that encourages the production of feed grains and the maintenance of supplies of livestock feeds at reasonable prices. This action is in response to an increasing demand for livestock products, result of economic development and of an increase in the national product.

The new feed grains program will be administered by the National Wheat Service along the lines of a similar market regulation program for wheat. It will involve purchases of grains from growers at guaranteed prices and sales to livestock producers and animal feeding industries.

The National Wheat Service is authorized to supply growers with seeds and fertilizer at reasonable prices; to establish drying and storage facilities for imported and government-owned feed grains; and to assist in financing of drying and storage facilities owned by farmers and cooperatives.

The government has established support prices on commercial grade grains, delivered basis, for the 1963-64 season, as follows:

	Dollars per bushel
Barley (June-Sept.)	1.470
Oats (June-Sept.)	.847
Corn (Aug.-Nov.)	1.842
Sorghums (Aug.-Nov.)	1.778

The barley and oats prices will be increased by 25 cents per metric ton per month, October through February, and corn and sorghums prices by the same amount, December thru April.

Commercial quality standards for the feed grains will be as follows:

Barley:			
Test weight	lb.	per bu.	45.06
Moisture		percent	14
Foreign material and other grains:			
Other grains		do	2
Foreign material		do	1
Total		do	3
Oats:			
Test weight	lb.	per bu.	32.63
Moisture		percent	14
Foreign material and other grains:			
Other grains		do	2
Foreign material		do	1
Total		do	3
Corn:			
Test weight	lb.	per bu.	52.83
Moisture		percent	14
Foreign material and other grains:			
Broken kernels		do	4
Damaged kernels		do	3
Foreign material		do	1
Total		do	8
Grain sorghums:			
Test weight	lb.	per bu.	50.50
Moisture		percent	14
Foreign material and other grains:			
Damaged kernels		do	3
Broken kernels		do	2
Other grains		do	2
Foreign material		do	1
Total		do	8

Thai Corn Crop Reduced By Late Monsoon

The late arrival of the monsoon has caused the loss of much of the early corn crop in Thailand. As a result, the estimate of 750,000 metric tons for the 1963 crop has been reduced by 15 percent to 638,000 tons. This amount is 12,000 tons below the 1962 crop.

Even with this level of production, however, Thailand would still be able to fulfill its new 500,000-ton contract commitment to Japan this season.

Drought Reduces Taiwan's Rice Crops

Prolonged drought until the first week of June sharply reduced Taiwan's "first" rice crop, just harvested, and seriously threatened the "second" crop, planted in June and July.

As the season progressed, estimates of first-crop losses increased to between 15 and 20 percent of expected production. Although a recent official estimate is not yet available, the crop is believed to be about 17 percent below the first crop of 1962. This would be a reduction of 235,000 metric tons of rough rice, leaving a harvest of 1,160,000 tons compared with 1,395,000 in 1962.

The first crop—nearly one-half of annual production—is transplanted from January through March, depending on the area, and is harvested in May and June.

Acreage losses for the second crop, now being transplanted, have not yet been determined. This crop is seeded in May-June, transplanted in June and July, and harvested mainly in October. It is normally the larger of the two crops.

Among government emergency measures in late May were: the adoption of rotational irrigation, with inspection teams employed to control and distribute the water; the supplying of pumps to farmers; and the earmarking of a certain sum of money for farmers to encourage a switch to upland crops that need less water than rice. The extensive drilling of wells was also underway.

Abundant rice stocks were on hand at the beginning of 1963 from the record harvests of 1962. Therefore, brown rice exports of over 100,000 metric tons to Japan were being contemplated earlier in the year.

Flooding Injures Japanese Rice Crop

Continued rainfall and unfavorable weather in early June inflicted relatively moderate damage to Japan's 1963 rice crop. An official estimate of June 10 placed actual losses at 74,000 acres, producing an estimated 15,000 metric tons of rough rice.

Damage was less severe than for other crops, since rice planting was still in the seedling stage. However, the plants were reported weak and susceptible to disease.

The current rainy season was expected to extend to mid-July and could possibly cause further losses. The next official production forecast was to be released July 20.

Japan's record rice crop of 1962 was estimated at 16,261,000 metric tons of rough rice harvested on 8,116,000 acres. Average production from 1955 through 1959 was 14,810,000 tons; acreage, 8,081,000 acres.

West Germans Import More Cheese, Ship Less

West Germany imported 65 million pounds of cheese in the first quarter of 1963, compared with 60 million in the same period of 1962. Shipments came mostly from the traditional suppliers and included 28 million pounds from the Netherlands, 20 million from Denmark, and 7 million from France, with smaller quantities from Switzerland, Belgium, Finland, New Zealand, and Italy.

At the same time, West Germany exported 8 million pounds of cheese—2 million pounds less than in the first quarter of 1962. More than half went to Italy and most of the remainder, to Western European markets.

Less butter was imported in the first quarter of 1963 than in the same period a year earlier. Of the 22 million pounds imported so far, France supplied 5 million pounds; the Netherlands, 4 million; Denmark, 3 million; and Sweden, New Zealand, and Australia, 2 million each.

Australian Meat Moves to the U.S.

Two ships left Australia the third week of June with 5,783,680 pounds of beef, 470,400 pounds of mutton, and 4,480 pounds of variety meat for U.S. eastern and Gulf ports.

Ship and sailing date	Destination [1]	Arrival date	Cargo	Quantity
				Pounds
Cap Norte.....	Norfolk	([2])	Beef	103,040
June 19	Charleston	July 15	Beef	295,680
			Mutton	190,400
			Var. meats	4,480
	Newport	19	Beef	172,480
	Philadelphia	20	Beef	595,840
			Mutton	100,800
	New York	23	Beef	3,619,840
			Mutton	33,600
	Boston	28	Beef	441,280
Sameland.....	New Orleans	Aug. 12	Beef	327,040
June 19			Mutton	33,600
	Houston	17	Beef	228,480
			Mutton	112,000

[1] Cities listed indicate location of purchaser and usually the port of arrival and general market area, but meat may be diverted to other areas for sale. [2] To be transshipped.

Ecuador Imports More Inedible Tallow, Greases

Last year, Ecuadoran imports of U.S. inedible tallow and greases rose from 15.5 million pounds in 1961 to 19.7 million, and the value rose from $1.3 million to $1.5 million. Further increases seem likely because of the rapid rate of population growth and the consequent larger demand for soap.

There are 10 soap factories in Ecuador that import tallow and greases; the 5 largest use 90 percent of these imports. Eighty-three percent of the tallow comes in through Guayaquil, where 7 soap factories are located. Up until late 1962, all imports of tallow were made in drums, but since the large Guayaquil factories installed bulk handling equipment, most of the imports have been coming in bulk. Ecuador produces virtually no edible tallow or greases, since it has no rendering plants.

Tariffs levied on tallow and grease imports are 0.6 cents per pound, specific duty, plus 10 percent ad valorem. Imports must be authorized by the Ministry of Development and must have an official technical analysis, certified by the Ecuadoran Consul at the shipping port.

Although U.S. exports rose in 1962, the U.S. share of the Ecuadoran market for tallow and greases fell from 99 percent in 1961 to 85 percent in 1962, mainly because Australia had gained a foothold in Ecuador. In 1962, Australia supplied 10 percent of Ecuador's total tallow and grease imports. Other suppliers were Canada and the Netherlands.

U.S. exports to Ecuador continue to be large. On April 5, 1963, the Government of Ecuador signed a Public Law 480 Title IV agreement with the United States, which included the sale of $600,000 worth of tallow for dollars on long-time credit.

Argentine Firm To Ship Cooked Beef

A slaughter plant at San Jose, in the Province of Entre Rios, will be the first Argentine plant to ship cooked bulk beef to the United States under new procedures established this January by the U.S. Department of Agriculture. Beef shipped from this plant will not have to be recooked upon entry to the United States. It will, however, continue to be examined by the Department upon arrival. All imports from nonaccredited plants in Argentina must be recooked in the United States under supervision of U.S. Department of Agriculture inspectors, to preclude the possible entry of foot-and-mouth disease.

This small plant slaughters about 150 to 200 cattle per day and at present ships frozen beef to the United Kingdom and the Continent. An official of the firm will make a trip to the United States in the near future to make commercial arrangements and assess market prospects.

U.S. Meat Imports Rise

U.S. imports of most major categories of livestock and meat products showed increases in the first 5 months of 1963, compared with those for the same period in 1962. Hides and skins continued to be the exceptions.

Meat imports in May, at 116 million pounds, were 40.5 million pounds larger than in May 1962. Beef and veal imports rose by 37 million pounds—an increase of 71 percent. Pork imports were up slightly, the largest item being canned hams. Lamb imports were up sharply because of smaller supplies of U.S. lamb, and mutton imports increased by 53 percent.

Total red meat imports during January-May 1963, at 550 million pounds, were 20 percent greater than those during the same period in 1962. Beef and veal were up 23 percent, pork 8 percent, lamb 89 percent, and mutton 12 percent.

Imports of cattle in May 1963 were down 19 percent from a year earlier. For January-May 1963, total imports

of 489,000 head were 1 percent less than for the same period of 1962; imports from Canada were down 15 percent, as compared to 1962, while those from Mexico increased by 3 percent. Preliminary reports indicate that imports from Canada dropped further in June, bringing the 6-month total down 16 percent from 1962.

Wool imports in May continued to be above those in the same month of 1962, largely because of increased imports of duty-free carpet wools.

Hides and skin imports showed mixed trends in May with four kinds—calf, buffalo, kip, goat and kid—showing increases over May 1962. Calf and kip were the only classes showing increased imports for the first 5 months of 1963 compared with a year earlier.

LIVESTOCK PRODUCTS: U.S. IMPORTS OF SELECTED ITEMS, MAY 1963, WITH COMPARISONS

Commodity	May		Jan.-May	
	1962	1963	1962	1963
Red meats:	*1,000 pounds*	*1,000 pounds*	*1,000 pounds*	*1,000 pounds*
Beef and veal:				
Fresh and frozen, bone-in	762	1,756	6,610	8,435
Fresh and frozen, boneless	42,786	73,715	282,175	338,837
Canned, including corned	6,123	10,519	27,493	44,411
Pickled and cured	13	77	227	221
Veal, fresh and frozen	1,764	2,097	8,253	7,711
Other meats [1]	1,536	2,266	10,309	11,330
Total beef & veal	52,984	90,430	335,067	410,945
Pork:				
Hams and shoulders canned	11,424	12,978	53,945	60,905
Other pork [2]	7,671	6,732	32,554	32,119
Total pork	19,095	19,710	86,499	93,024
Mutton	2,962	4,528	32,825	36,765
Lamb	432	1,353	5,152	9,725
Total red meat	75,473	116,021	459,543	550,459
Variety meats	129	193	930	1,067
Wool (clean basis)				
Dutiable	9,399	8,583	57,367	60,914
Duty-free	9,990	15,538	52,704	72,025
Total wool	19,389	24,121	110,071	132,939
	1,000 pieces	*1,000 pieces*	*1,000 pieces*	*1,000 pieces*
Hides and skins:				
Cattle	34	32	274	167
Calf	54	101	241	265
Buffalo	86	91	404	274
Kip	86	126	314	458
Sheep and lamb	3,386	3,139	16,378	13,963
Goat and kid	1,202	1,515	6,888	6,414
Horse	63	61	234	187
Pig	182	148	809	514
	Number	*Number*	*Number*	*Number*
Live cattle [3]	90,156	73,102	492,232	488,557

[1] Other meat, canned, prepared or preserved. [2] Fresh or frozen; hams, shoulders, bacon not cooked; sausage except fresh; prepared and preserved. [3] Includes cattle for breeding.
U.S. Department of Commerce.

Meat Shortage in Czechoslovakia

Because of meat shortages, on July 1 the Government of Czechoslovakia introduced a meatless day for each week. Municipal national committees will designate the meatless day (excluding Saturdays and Sundays) for all public eating establishments in specified localities. Exceptions are permitted in factories, snack bars, international hotels, dining cars, and shops selling semiprepared foods to the public. All citizens are being urged to raise meat animals on their property no matter how small it may be.

El Salvador's Cigarette Output Rising

Cigarette output in El Salvador during 1962 totaled 1,011 million pieces, compared with 944 million in 1961 and 865 million in 1960.

Leaf usings in cigarettes last year amounted to 2.2 million pounds, consisting of 1.8 million domestic leaf and 0.4 million imported. Imports of cigarette leaf, mainly flue-cured and minor quantities of burley, are obtained principally from the United States for blending purposes.

North Borneo's Cigarette Trade at Record

North Borneo's imports of cigarettes during 1962 totaled 11.3 million pounds—a new record. Imports last year were 4.8 million pounds greater than the 6.5 million imported during 1961 and slightly more than 4 times the 1960 level of 2.8 million. The principal suppliers continued to be Hong Kong, the United States, and the United Kingdom.

Imports from Hong Kong last year totaled 8.8 million pounds, compared with 4.4 million in 1961. Takings from the United States also rose, from 1.8 million pounds in 1961 to 2.1 million in 1962, while imports from the United Kingdom, at 292,000 pounds, were about 13 percent below the 335,000 pounds imported during the previous year.

North Borneo's exports of cigarettes last year were also at a record. Total shipments amounted to 9.8 million pounds—almost 3 times the 1961 exports of 3.6 million but more than 5 times the 1960 level of 1.8 million. The principal destination continued to be the Philippines.

Exports to the Philippines last year totaled 9.5 million pounds, compared with 3.4 million in 1961 and 1.6 million in 1960. Shipments to Indonesia and Sarawak were also up from 1961, but exports to Brunei were down.

Blue Mold Damages Cyprus Tobacco Crop

Blue mold is reported to have done extensive damage to tobacco in the principal growing areas of Karpass, Cyprus. To combat this virus disease, tobacco growers, taking the advice of the U.S. Department of Agriculture, are thinning out plantings and spraying plants.

(*Commonwealth Producer,* No. 395, May-June, 1963).

U.S. Tobacco Exports Down a Little in May

U.S. exports of unmanufactured tobacco in May 1963, at 28.3 million pounds (export weight), were down 3 percent from those of May 1962. Export value was down nearly 7 percent.

Flue-cured exports, at 21.5 million pounds, were nearly 2 million pounds under the 23.4 million shipped out in May 1962. Burley exports, however, at 3.6 million pounds, were substantially larger than the 2 million of last May. Exports of Maryland, at 849,000 pounds, were well above those for May 1962, but exports of other kinds, except

Black Fat, were down.

For the first 5 months of calendar 1963, total U.S. exports of unmanufactured tobacco remained a little above those of January-May 1962—134.9 million pounds, compared with 131.9 million last year. But for the first 11 months of fiscal 1963, total exports, at 433 million pounds, were 10 percent below the 481.2 million shipped out in the corresponding months of fiscal 1962, and flue-cured exports were only 340.6 million pounds—down 13.4 percent.

U.S. exports of tobacco products in May 1963 were valued at $12.8 million—up from the $9 million for May 1962. However, for the first 5 months of calendar 1963, the total value of tobacco products was 2 percent below the value for January-May 1962.

U.S. EXPORTS OF UNMANUFACTURED TOBACCO, MAY 1963, WITH COMPARISONS

(Export weight)

Kind	May		January-May		Percent change from 1962
	1962	1963	1962	1963	
	1,000 pounds	*1,000 pounds*	*1,000 pounds*	*1,000 pounds*	*Percent*
Flue-cured	23,351	21,503	104,365	99,952	— 4.2
Burley	2,033	3,564	10,671	16,616	+55.7
Dark-fired Ky.-Tenn.	1,338	941	5,546	5,082	— 8.4
Va. fire-cured [1]	435	31	1,998	2,560	+28.1
Maryland	595	849	3,336	3,307	— .9
Green River	121	——	441	221	—49.9
One Sucker	6	4	72	73	+ 1.4
Black Fat, etc.	283	562	1,453	1,909	+31.4
Cigar wrapper	897	360	1,987	1,879	— 5.4
Cigar binder	45	38	240	463	+92.9
Cigar filler	2	66	2	134	+ —
Other	109	417	1,834	2,712	+47.9
Total	29,215	28,335	131,945	134,908	+ 2.2
	Mil. dol.	*Mil. dol.*	*Mil. dol.*	*Mil. dol.*	*Percent*
Declared value	22.2	20.7	98.7	104.2	+ 5.6

[1] Includes sun-cured.
Bureau of the Census.

U.S. EXPORTS OF TOBACCO PRODUCTS, MAY 1963, WITH COMPARISONS

Product	May		January-May		Percent change from 1962
	1962	1963	1962	1963	
Cigars and cheroots					*Percent*
1,000 pieces	1,556	2,790	8,448	11,647	+37.9
Cigarettes					
Million pieces	1,880	2,635	9,986	9,451	— 5.4
Chewing and snuff					
1,000 pounds	27	70	204	257	+26.0
Smoking tobacco, package					
1,000 pounds	78	92	287	317	+10.5
Smoking tobacco in bulk					
1,000 pounds	522	801	3,062	4,097	+33.8
Total declared-value					
Million dollars	9.0	12.8	48.0	47.0	— 2.1

Bureau of the Census.

Togo's Cigarette Imports Up

Togo's imports of cigarettes during 1962 totaled about 1.2 million pounds, compared with 900,000 for the previous year. Larger takings from the United Kingdom, the United States, France, the Netherlands, and Senegal were more than enough to offset the sharp decline in imports from Algeria, the principal supplier of the past.

Imports from the United Kingdom last year, at 538,000 pounds, were about 3 times larger than the 1961 level of 187,000 pounds and represented 44 percent of total imports. Takings from the United States rose from 42,000 pounds in 1961 to 64,000 pounds in 1962. Imports from Senegal totaled 424,000 pounds, France 69,000, and the Netherlands 15,000. Imports from Algeria last year were the smallest during recent years and amounted to only 97,000 pounds, compared with 582,000 in 1961, 606,000 in 1960 and 748,000 in 1959.

Togo's imports of unmanufactured tobacco during 1962 totaled 153,000 pounds, compared with 239,000 in 1961. Smaller takings from the United States, the principal supplier, accounted for the decline.

Imports from the United States, at 82,000 pounds, were less than one-half the 1961 level of 171,000 pounds. Imports from the Rhodesias-Nyasaland totaled 58,000 pounds, compared with 48,000 for the previous year.

Hungarian Cigarette Output Down

Cigarette output in Hungary turned downward during 1962 after showing annual gains during recent years. Production last year totaled 16,449 million pieces, compared with 16,793 million in 1961. The decline last year occurred during the last 6 months, whereas the output during the first 6 months was almost 6 percent greater than for the similar period in 1961.

India Subsidizes Lemongrass Oil

India's State Trading Corporation began purchasing lemongrass oil (with 76-percent citral content) on June 21, at a fixed minimum price of Rs13.75 per kilogram ($1.31 per lb.) to give price support to this industry. Purchasing centers are being established at Telicherry, Calicut, Alwaye, Cochin, and Alleppey.

India usually exports over $4 million worth of lemongrass oil a year, mostly to the United Kingdom, the USSR, the United States, and Japan. During 1962, U.S. imports from India amounted to 324,000 pounds, valued at $730,000 and representing over one-fourth of our annual requirements.

Indian Minimum Jute Price To Be Continued

India will continue its "operational minimum" jute price of 7.7 cents a pound, wholesale, for the 1963-64 crop. This price was announced in January 1962, after the record jute and mesta crop of 1961 and the resultant downward movement of prices.

The Government of India announced early in 1962 that it was organizing a Jute Buffer Stock Agency to alleviate the difficulties that extremely low prices cause for raw jute producers. When the price falls below 7.7 cents a pound wholesale for Assam Middles grade at Calcutta, the Agency assigns purchases of raw jute, each mill buying in accordance with its quota. No specific floor price was fixed; but since the Agency represents about 90 percent of India's total loomage (all mills of the Indian Jute Mills

Association and some others), it was felt that the concerted action would hold prices at a reasonable minimum.

Jute price controls are not new in India, for jute has a tendency toward wide fluctuations in quantity and price. Most controls have been informal, handled largely through the Indian Jute Mills Association. A support price became effective in early 1959 when surplus supplies from an exceptionally large crop in 1958 sent prices to very low levels. Also, inflationary prices after the small 1959 and 1960 crops caused the Indian Jute Mills Association to adopt a voluntary scheme of maximum prices for their purchases. The swing back to low prices for the large 1961 and 1962 crops caused the present minimum price action.

Ecuador's Fats and Oils Imports Trend Upward

Ecuador's imports of fats and oils are expected to continue to increase in the next several years. In 1962, they totaled 23,000 metric tons—more than 50 percent above 1961 imports. Edible oil imports increased by 4,000 tons, and tallow imports by 4,300.

ECUADOR: FATS AND OILS IMPORTS, TOTAL AND FROM THE UNITED STATES, 1961 AND 1962

Item	1961		1962	
	U.S. origin	Total	U.S. origin	Total
	1,000 metric tons	*1,000 metric tons*	*1,000 metric tons*	*1,000 metric tons*
Edible oils:				
Soybean	3.0	3.4	2.3	4.9
Coconut	.2	1.1	.1	4.5
Palm	.4	1.8		.5
Cottonseed	.3	.4	(1)	(1)
Olive	(1)	.2	—	.2
Hydrogenated [2]	.6	.6	1.2	1.4
Total	4.5	7.5	3.6	11.5
Inedible fats:				
Tallow	7.3	7.3	9.9	11.6
Grand total	11.8	14.8	13.5	23.1

[1] Less than 50 tons. [2] Type not specified.
Publicaciones Comerciales C.A.

While imports from the United States increased somewhat in 1962, the U.S. share of the total declined from 80 percent in 1961 to 58 percent in 1962. This decline reflects largely the reduced volume of soybean oil from the United States and the increased volume from Western Europe. Trade people expect to continue importing from Western European countries because of more favorable credit terms and prices.

Philippines Export More Copra, Coconut Oil

Copra and coconut oil exports of the Philippines in January-June 1963, as compiled from monthly data on registered shipments, totaled 386,390 and 91,440 long tons, respectively. Exports in the comparable period of 1962 amounted to 327,860 tons for copra and 43,887 tons for coconut oil.

On an oil equivalent basis, the combined exports amounted to 334,866 tons in January-June 1963, compared with 250,439 tons in the same period of 1962—an increase of 34 percent.

Uruguay Increases Oilseed-Products Taxes

The Uruguayan Government has issued a decree establishing new rates for taxes on exports of oilseeds and oilseed products as well as numerous other commodities. These rates are intended to counterbalance the effects of the peso devaluation in late May.

URUGUAY: EXPORT TAXES ON OILSEEDS AND PRODUCTS EFFECTIVE BEFORE AND AFTER MAY 28, 1963

Item	Taxes effective before May 28, 1963		Taxes effective by decree of May 28, 1963		Increase, pesos basis
	Pesos per metric ton	U.S. dol.[1] equiv.	Pesos per metric ton	U.S. dol.[2] equiv.	(percent)
Sunflowerseed	39.00	3.55	330.60	20.04	748
Sunflowerseed oil	117.00	10.66	987.75	59.86	744
Sunflowerseed meal	33.00	3.01	363.85	22.05	1,002
Sunflowerseed expeller	36.00	3.28	319.50	19.36	787
Peanuts (shelled)	108.00	9.84	553.50	33.55	412
Peanut oil	176.00	16.03	1,127.75	68.35	541
Peanut oil meal	32.00	2.91	311.45	18.88	873
Peanut oil expeller	32.00	2.91	336.70	20.41	952
Flaxseed	218.00	19.85	677.67	41.07	211
Linseed oil	105.00	9.56	910.95	55.21	767
Linseed oil meal	33.00	3.01	294.23	17.83	792
Linseed expeller	36.00	3.28	319.50	19.36	787

[1] Converted at the rate of 10.98 pesos per 1 U.S. dollar effective prior to devaluation. [2] Converted at the rate of 16.50 pesos per 1 U.S. dollar effective after devaluation.

U.S. Exports of Soybeans, Edible Oils, Meals

Although exports of U.S. soybeans, edible oils, and cakes and meals in May dipped below the previous month's level, cumulative exports since the start of the 1962-63 marketing year last October have remained significantly above those for the comparable period in 1961-62.

In May, *soybean* exports from the United States, at 11.6 million bushels, were down by nearly one-fifth from April. However, cumulative exports in the October-May period, at 131.1 million bushels continued at a level 11 percent above those in the comparable period of 1961-62. Major destinations for U.S. soybeans in May, with their respective percentages of total exports, were: Japan 26, Canada 24, the Netherlands 11, Denmark 8, West Germany 5, and the United Kingdom 4.

Exports of *edible oils* (soybean and cottonseed) totaled 177.2 million pounds—a sharp decline from those in April, despite some increase in "foreign donations" exports. Cumulative shipments, at over 1.1 billion pounds, were nearly 8 percent above those for the corresponding period in 1961-62. (These however, include 32.9 million pounds of crude soybean oil exported to Spain, which was returned to the United States without being discharged.) Foreign donations accounted for 8 percent of the cumulative total in 1962-63, against one-fifth in the same period last year.

May exports of *soybean oil*, at 114.3 million pounds, were down by nearly two-fifths from the 183.7 million reported to have been shipped in April. (This includes 33.1

million pounds of soybean oil which presumably moved to Yugoslavia in April but was not reported. See note, p. 16, *Foreign Agriculture,* June 24, 1963.) Major destinations of U.S. soybean oil exclusive of foreign donations, with their percentages of the total, were: Spain and Yugoslavia 35 each, Iran 8, Turkey 7, and Israel 5. Cumulative exports during the October-May period were 18 percent above the comparable period last year.

Cottonseed oil exports in May rose to 62.9 million pounds—nearly double those in April. Major destinations and percentages in May were: the Netherlands 30, West Germany 24, Turkey 16, Iran 10, and Israel 7. Cumulative exports through May are lagging behind those of last year by about 13 percent.

Exports of *cakes and meals* in May, at 138,400 short tons, declined 10 percent from those reported in April. However, cumulative shipments remain nearly 50 percent above those of the corresponding period in 1961-62. (This takes into account a correction in data from the Bureau of the Census, which in March reported 49,282 tons of soybean meal to Spain, and now reports 29,282 tons.)

Soybean meal exports of 132,300 tons accounted for over 95 percent of the May total. Major destinations and percentages were: France 25, Spain 23, Canada 21, West Germany 11, Italy 8, the Netherlands 4, and Venezuela 3.

U.S. EXPORTS OF SOYBEANS, EDIBLE OILS, AND OILSEED CAKES AND MEALS, MAY 1963

Item	Unit	May		October-May	
		1962 [1]	1963 [1]	1961-62 [1]	1962-63 [1]
Soybeans	Mil. bu.	12.7	11.6	117.4	131.1
Oil equiv.	Mil. lb.	139.6	126.9	1,289.0	1,439.7
Meal equiv.	1,000 tons	298.7	271.6	2,758.7	3,081.4
Edible oils:					
Soybean:					
Commercial [2]	Mil. lb.	94.4	95.5	539.9	[3] 738.9
Foreign donations [4]	do.	11.6	18.8	142.6	63.2
Cottonseed:					
Commercial [2]	do.	38.0	58.2	275.8	271.8
Foreign donations [4]	do.	6.4	4.7	66.5	27.3
Total oils	do.	150.4	177.2	1,024.8	1,101.2
Cakes, meals:					
Soybean	1,000 tons	97.1	132.3	757.4	1,032.2
Cottonseed	do.	.1	4.5	2.9	73.4
Linseed	do.	([5])	.4	11.7	34.7
Total cakes and meals [6]	do.	97.2	138.4	772.2	1,149.8

[1] Preliminary. [2] Compiled from records of the Bureau of the Census; includes Titles I, II, and IV, P.L. 480. [3] Includes 32,855,509 pounds exported to Spain in January but returned without being discharged. This figure is expected to be included in the March FT 110—Part 2, under "U.S. articles returned." [4] Title III, P.L. 480. [5] Less than 50 tons. [6] Includes peanut cake and meal and small quantities of other cakes and meals.

Compiled from records of the Bureau of the Census and USDA.

Indonesia's Exports of Copra, Palm Products

Registered exports of copra, palm oil, and palm kernels from Indonesia rose in February.

Exports of copra, at 4,679 long tons, were up from the January shipments of 2,968 tons but below the 5,852 tons exported in February 1962. Exports during January-February totaled 7,647 tons—6 per cent below the 8,155-ton volume exported during January-February 1962. January 1963 exports by country of destination were: Penang, 2,594 tons; Singapore, 325 tons; Sarawak, 49 tons.

Registered exports of palm oil increased to 9,411 short tons in February from 8,316 tons the month before; exports in February 1962 were 6,024. Exports during January-February were 17,727 tons, in contrast to 13,517 in the same months of 1962—up nearly one-third.

Palm kernel exports in February, at 5,130 short tons, were up from the 3,542 tons shipped in January and the 1,626 tons shipped in February 1962. Total exports for January-February, at 8,672 tons, were more than twice the 3,503-ton volume exported in the same period of 1962.

1963 Italian Almond Harvest Large

Italy's 1963 commercial almond harvest is forecast at 42,000 short tons, shelled basis. This is well above the 14,000-ton 1962 harvest and also ahead of the 29,400-ton average for 1956-60. The record 1961 crop has been revised still further upward, to 66,000 tons.

ITALY, ALMOND SUPPLY AND DISTRIBUTION, 1961-63

Item	1961	1962	1963
	Short tons	*Short tons*	*Short tons*
Beginning stocks (Sept. 1)	1,000	11,000	500
Production	66,000	14,000	42,000
Total supply	67,000	25,000	42,500
Exports	48,000	18,500	——
Domestic disappearance	8,000	6,000	——
Ending stocks (Aug. 31)	11,000	500	——
Total distribution	67,000	25,000	——

Italian almond exports during the first 8 months (September-April) of the 1962-63 season are estimated at 15,300 short tons, shelled basis; total exports may reach 18,500 tons. In the 1961-62 season, a record total of 48,000 tons was exported.

Almond season stocks at the beginning of the 1963 season, unlike those at the beginning of the 1962 one, are expected to be negligible.

Italian prices for unselected almonds, f.o.b. Bari, averaged 65 cents per pound during June 1963, after remaining in the high sixties during most of the 1962-63 season but dropping to the high fifties during April.

U.S. Exports Less Cotton

U.S. exports of all types of cotton totaled 2,926,000 running bales in the first 10 months (August-May) of the current season, compared with 4,024,000 bales shipped in the same months a year earlier.

May exports totaled 310,000 bales, compared with 299,000 in April and 361,000 in May 1962.

As of July 5, registrations for exports under the 1962-63 payment-in-kind program had reached 3,279,000 bales, compared with 4,916,000 bales on approximately the same date a year earlier. Sales for export on and after August 1, 1963, under the competitive bid sales program totaled 1,282,702 bales as of July 9, and export registrations under

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the 1963-64 payment-in-kind program amounted to 9,435 bales as of July 5. Sales for export of Egyptian and Sudanese extra long staple cotton formerly in the national stockpile were 341 bales in June 19 and July 3 openings.

COTTON: U.S. EXPORTS BY COUNTRY OF DESTINATION
AUGUST-MAY 1962-63, WITH COMPARISONS

(1,000 running bales)

Destination	Year beginning August 1			August-May	
	Average 1955-59	1960	1961	1961	1962
Austria	33	35	33	30	11
Belgium & Lux.	160	179	100	90	68
Denmark	17	23	13	12	12
Finland	22	29	21	20	13
France	360	549	300	282	166
Germany, West	475	421	205	195	94
Italy	416	454	376	350	179
Netherlands	124	179	106	95	69
Norway	10	14	13	13	9
Poland & Danzig	85	228	139	66	60
Portugal	28	25	18	16	6
Spain	171	171	155	155	(1)
Sweden	75	101	99	94	54
Switzerland	64	99	75	72	36
United Kingdom	525	371	270	251	131
Yugoslavia	108	88	175	82	113
Other Europe	17	8	8	5	6
Total Europe	2,690	2,974	2,106	1,828	1,027
Australia	54	49	64	56	34
Canada	217	259	397	343	232
Chile	35	51	12	12	22
Colombia	33	0	1	1	1
Cuba	27	2	0	0	0
Ethiopia	4	4	13	11	15
Hong Kong	134	219	104	102	66
India	184	599	215	28	146
Indonesia	30	36	46	33	38
Israel	16	9	10	8	6
Japan	1,154	1,746	1,028	915	822
Korea, Rep. of	205	195	300	196	181
Morocco	10	9	14	14	7
Pakistan	14	5	39	23	1
Philippines	64	149	142	120	93
South Africa	26	51	52	47	17
Taiwan (Formosa)	153	176	256	185	153
Thailand	4	23	30	24	22
Uruguay	15	18	11	11	0
Venezuela	2	(1)	16	16	4
Vietnam[2]	2	26	30	29	30
Other countries	27	32	28	22	9
Total	5,100	6,632	4,914	4,024	2,926

[1] Less than 500 bales. [2] Indochina prior to 1958. Includes Laos and Cambodia.

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the 1963-64 payment-in-kind program amounted to 9,435 bales as of July 5. Sales for export of Egyptian and Sudanese extra long staple cotton formerly in the national stockpile were 341 bales in June 19 and July 3 openings.

COTTON: U.S. EXPORTS BY COUNTRY OF DESTINATION AUGUST-MAY 1962-63, WITH COMPARISONS

(1,000 running bales)

Destination	Year beginning August 1			August-May	
	Average 1955-59	1960	1961	1961	1962
Austria	33	35	33	30	11
Belgium & Lux.	160	179	100	90	68
Denmark	17	23	13	12	12
Finland	22	29	21	20	13
France	360	549	300	282	166
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